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CANADIAN
TOURISM
COMMISSION




COMMISSION
CANADIENNE
DU TOURISME

1995/96 Annual Report



a solid base
for
partnerships





This Annual Report covers the period
from April 1, 1995 to March 31, 1996

mission

To sustain a vibrant and profitable Canadian tourism industry.

mandate

In accordance with the Commission's Charter, the Board of Directors of the Canadian Tourism Commission is vested with the authority to plan, direct, manage and implement programs to generate and promote tourism in Canada.

strategic objectives

The main thrusts of the Commission are to market Canada as a desirable travel destination and to provide timely and accurate information to the tourism industry to assist in their decision making.

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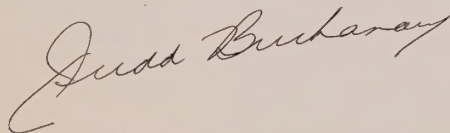
Chairman's message

1995 had all the makings of a watershed year for tourism in Canada. With the strong backing of Prime Minister Jean Chrétien, the Canadian Tourism Commission (CTC) was created to initiate a new approach to the business of tourism. As a private/public sector partnership, the CTC set out to regain market share and reduce the travel deficit. In establishing the CTC, the Prime Minister responded to the tourism industry's requests for additional funding for marketing and a direct voice in the program design.

The CTC's major challenge was to match the federal government's annual contribution, which increased from \$15 million to \$50 million, and to raise the total marketing budget to \$100 million in three years. We expect to exceed our \$100 million target by the end of our second year. This achievement was only made possible by the partnerships forged. Looking back on this past year, I take pride in the spirit of teamwork and cooperation that moved the CTC forward.

Results to date are impressive: a decline in our travel deficit by \$1 billion over 1994 and an increase in tourism revenues to a total of \$41.8 billion. The 1995 tourism revenues over 1994 generated a two percent increase in tourism employment — more than 8,000 new persons employed directly in the industry. In the first year of operation, \$40 million was raised in partner funding, increasing the CTC's total marketing budget to \$90 million.

I would like to acknowledge the dedication and hard work of our Board, committee members, President Doug Fyfe and his staff during this start-up period. I would also like to thank our partners for their enthusiasm and commitment in developing programs that will position Canada as one of the world's preferred travel destinations.



The Honourable Judd Buchanan, Chairman



President's message

A radically new approach to tourism marketing. That's how I would describe the formation of the Canadian Tourism Commission in 1995.

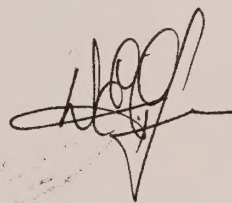
As President, I was charged with the challenge of evolving the former Tourism Canada from government ownership into a joint private/public sector body linking together the entire Canadian tourism industry. No longer

a granting body, our primary role is to market Canada in partnership with industry.

A year later, a new appreciation of the Commission's role and function has emerged. Driven by industry and the market itself, the organization's primary goals are to reduce the travel deficit and see Canada move up the charts of the top tourism destinations. To accomplish this, tourism professionals across the country are designing and implementing programs under the counsel of the CTC program committees, staff and Board members.

Actions in the first year included a difficult restructuring that reduced the CTC staff by more than 50%, and a series of townhall meetings which were convened across the nation to solicit industry input to all CTC programming. A bi-monthly newsletter, *Canada Communiqué*, provides current information on the CTC and its programs, and new Internet links provide Canadian tourism information on-line.

Our priority over the next year will be to increase our global market share through an integrated, coordinated effort with as many tourism operators as possible across Canada. Our first year of activities has established a solid base of partnerships necessary for continued success in the next decade.



Doug Fyfe, President



Marketing Canada

In its quest to market Canada at home and abroad, the Canadian Tourism Commission coordinates the efforts of many players in the tourism industry. This coordination is mainly carried out by the eight program committees which are each chaired by a private sector representative. Selected by the Board, the committee chairs invite various industry members to sit on the committees to develop specific action plans. The committees take their direction from the Board of Directors. In consultation with the industry, the committees work out the strategy, budget, and mix of activities for each program area. Once the programs are developed, the committees present them to the Board for final approval. The CTC staff is then responsible to carry out the programs.

There are six marketing programs that cover specific markets. They are U.S. Leisure, U.S. Business Travel, Europe, Asia/Pacific, Canada, and the Aboriginal program. The Aboriginal program is a new initiative to explore the demand for Aboriginal culture in Canada and in Europe. The others are the markets where nearly all of Canada's tourist dollars come from and where Canada can expect continued growth.

The Industry Competitiveness Program is divided into two specific areas: Research and Industry Enhancement. The Research unit provides comprehensive information and data to industry. Working closely with Research is the Industry Enhancement group which focuses on helping industry develop products that will meet market demand and identify issues critical to our competitiveness.

The following pages highlight each of the programs' achievements and challenges for the 1995/96 fiscal year.

Special Initiatives Group

In addition to the eight core programs, the CTC offers expertise and coordination in the area of trade show and special projects/event management through their Special Initiatives Group (SIG). The SIG is called upon to develop innovative promotions and special events that complement the CTC's marketing strategies. For example, to highlight the launch of the U.S. Leisure and Aboriginal campaigns, the SIG group helped coordinate special events in specific cities. These events have been very successful in creating more visibility for Canadian travel experiences and will continue to be an integral part of the CTC's marketing thrust.

Corporate Services

Matters pertaining to the Board meetings, general administration, the bi-monthly newsletter — *Communiqué* — and finance are handled by Corporate Services. The group also oversees two reference facilities — the Tourism Reference and Documentation Centre (TRDC) and the CTC Photo Collection.

The TRDC offers a wealth of information on all aspects of the tourism industry. The TRDC has a collection of more than 10,000 documents and is the distribution centre for CTC publications ranging from "how to" manuals to industry reports and market studies. Other services include interlibrary loans, reference services, Internet searches and faxback.

The Photo Collection houses approximately 80,000 photos by professional photographers featuring the geography, people and culture of Canada. The photos are available at a reasonable charge for use in materials and projects that promote Canadian tourism. Images are available in a variety of formats such as slides, transparencies, prints or digital files. A CD-ROM catalogue on the entire inventory of images will soon be available.



The CTC partnering relationship

There are a variety of partners involved in CTC programming. It is impossible to list here all the partners, both domestic and international, that work cooperatively to sell Canada. This diagram provides a simplified summary of the process and inputs that occur at the different levels of influence in the CTC partnership process. There are three main levels of "influence": the Board of Directors, the Executive Committees for each of the eight programs and the CTC staff.

1. Board of Directors

The Board is comprised of 26 members from different tourism sectors, representing all regions of Canada. The members are appointed to serve a two year term. The Chair and President serve a five year term. All terms are renewable.

Inputs	Activities	Outputs
<ul style="list-style-type: none">Views, issues and concerns of 26 industry and federal, provincial and territorial government membersInformation on the performance of the industry	<ul style="list-style-type: none">Oversees and sets direction for Canadian tourism development and marketingApproves resource allocations (federal & partner contributions)Decides on strategic marketing and business plans (general strategic development)Selects Chairs for each executive committee from the private sector	<ul style="list-style-type: none">Overall strategic direction & mission of the CTC

Evaluation

In cooperation with its partners, the CTC is putting in place evaluation mechanisms that will effectively measure the overall performance of its programs. The Board's Performance Measurement Committee has established an accountability framework that will allow the CTC to assess its services, benefits and results. And each program has a series of performance indicators that enables the CTC and its partners to review the achievements against initial targets and determine what changes are required.

2. Executive Committees

Each Executive Committee is chaired by a private sector representative. In addition, there are a variety of sub-committees that help work out the mix of activities for their specific program area.

Inputs	Activities	Outputs
<ul style="list-style-type: none">Approve resource allocationIdentify key tourism issues from industry perspective and public policy	<ul style="list-style-type: none">Develop programs including identification of tactics and implementation plans in consultation with industryPrepare strategic and operational plansGenerate partners and resourcesArbitrate partner issues for the CTC	<ul style="list-style-type: none">Direction of operational programming activities for CTC staff

3. CTC Staff

The CTC's staff is made up of tourism professionals (many from the federal public service) who provide support to the Commission and carry out the programs approved by the Committees and the Board of Directors.

Inputs	Activities	Outputs
<ul style="list-style-type: none">Resources allocated for programming activitiesKey issues and program elements to be addressed by specific operational activities	<ul style="list-style-type: none">Develop and implement specific marketing, product enhancement and research projectsHands-on partner co-delivery/supported relationships with industryWork in the field to meet project-specific needs	<ul style="list-style-type: none">Targeted and marketing communication campaignsEnhanced tourism products, packages and venuesResearch projects to meet the information requirements of the CTC and industryDevelopment and communication of tourism data and information

results

1. In 1995, the total receipts from 11.1 million trips were approximately \$3.7 billion.

2. The "Ski Canada" promotional insert resulted in close to 4,000 bookings and 1,600 inquiries for partners.

3. Targets for 1996 are \$4.2 billion in receipts from 12 million trips.

4. **Trips**

1995	11,079,000	↑ + 3.07 %
1994	10,749,000	

Receipts

1995	\$3.7 billion	↑ + 8.82 %
1994	\$3.4 billion	

5. The U.S. Leisure committee spent a total of \$29 million: \$19 million from the CTC and \$10 million from partners.



CTC



Partners

THE WORLD NEEDS MORE
CANADA

U.S. L

focus The marketing of Canada to the largest tourism market in the world — the U.S. leisure market — is research-based and customer-driven, and is focused on

groups ranging from baby boomers to

mature travellers, all with household

incomes of \$50,000 or more. With

the goal of attracting first-time visitors from

more than a five-hour drive away, efforts in this area also

continued to attract a large volume of repeat visitors from traditional closer markets.



isure

U.S.A.

#1

actions

- **"The World Needs More Canada"** was developed as a theme for this market.
- **A major television campaign** ran in three U.S. cities (Los Angeles, New York and Chicago), as well as a follow-up booklet for first-time visitors on where, what and how to travel in Canada.
- **Promotional information** featuring 1-800 telephone numbers from industry partners was inserted in the *New York Times*, *Chicago Tribune* and *Los Angeles Times* newspapers, as well as *Gourmet*, *The New Yorker*, *Food & Wine*, and *Travel & Leisure* magazines.
- **A "Ski Canada" promotional insert** was placed in two top magazines, *Ski* and *Snow Country*.
- **A direct mail piece** called "Over the Fence" was mailed out to one million mature travellers.

challenges

Although eight out of ten foreign visitors to Canada come from the United States, traffic from the U.S. has levelled off over the past few years, resulting in more than one billion dollars in lost tourism revenue.

The number one challenge of the group responsible for "selling" Canada to U.S. leisure travellers is quite simply to raise awareness of Canada. Overcoming this challenge is made more difficult by the high cost of promotion and advertising in the U.S. market, and by the fact that the world is competing for a share of this market.



looking ahead

Success in luring the leisure traveller to Canada will evolve, as efforts are expanded to include the promotion of fall and winter destinations, and general awareness builds. The horizon also features a greater emphasis on specialized TV and print advertising, and the development of concepts such as the Canada Store, a one-stop source for information about travel in Canada combined with retail products.

"Finally we have an organization that is providing an umbrella for tourism across the country. In Montréal, we're continuing our planned programs to attract travellers from the U.S. and around the world, knowing that the CTC is there to hear us and to support us."

Jean Chrétien
Executive Vice President
Greater Montréal Convention and Tourism Bureau
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results

1. The total number of overnight visitors was 2.1 million, resulting in total receipts of \$2.1 billion in 1995.

2. More than 318,000 consumer inquiries were received, an impressive benchmark against which to measure success in this area in future years.

3. Trips

'95 2,119,000
'94 1,936,000 ↑ + 9.45%

Receipts

'95 \$2.1 billion
'94 \$1.8 billion ↑ + 16.67%

4. Total spending in this geographic area was \$24 million in 1995, with \$9 million coming from the CTC and \$15 million from partners in cash and in-kind.



CTC



Partners



CANADA
Discover our true Nature.

Eur

focus

Canada has a positive outdoor

image in Europe. Marketing efforts are focused

on targeting consumers directly from our primary

markets — the United Kingdom, France and

Germany — and building awareness of Canada as

a four-season travel destination. Efforts are equally

dedicated to the trade and consumers in secondary markets such as the Netherlands,

Italy and Switzerland. The promotion of product "clusters," or the grouping of travel

experiences, also ranks high among efforts in Europe. As well, along with traditional

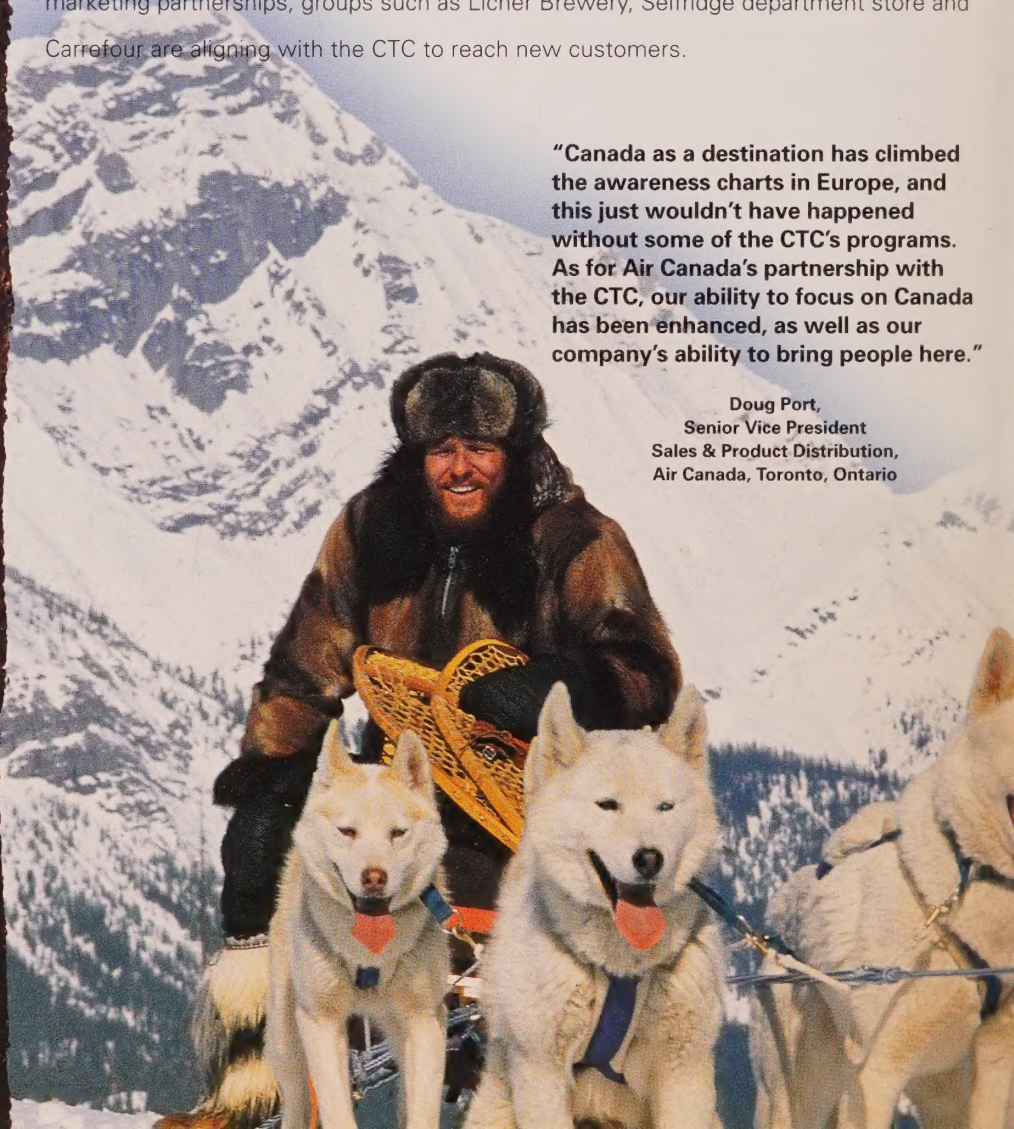
marketing partnerships, groups such as Licher Brewery, Selfridge department store and

Carrefour are aligning with the CTC to reach new customers.

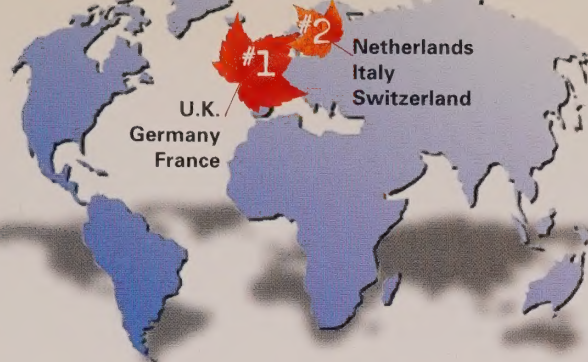


"Canada as a destination has climbed the awareness charts in Europe, and this just wouldn't have happened without some of the CTC's programs. As for Air Canada's partnership with the CTC, our ability to focus on Canada has been enhanced, as well as our company's ability to bring people here."

Doug Port,
Senior Vice President
Sales & Product Distribution,
Air Canada, Toronto, Ontario



ope



actions

- **The United Kingdom** was identified as a strong potential market for skiing. Efforts to re-position Canada as an affordable ski destination have begun to show results, with advertising reflecting a warm and inviting holiday. A major ski/winter insert in the *London Sunday Times* reached an estimated 1.7 million readers.
- **In France**, potential visitors were drawn by Canadian winter with larger-than-life images depicting the thrill of dogsledding on billboards and in the subways.
- **In Germany**, shoppers at an award-winning European shopping mall ("Schadow Arkaden") were treated to a major consumer promotion featuring a variety of Canadian products. Highlights included the Canadian Brass, native artists, country and western singers and square dancers. More than 160,000 Germans were exposed to the exhibits, and partners reported a very high rate of return on their investment.
- **In the Netherlands**, television ads showcased destinations in all seasons.
- **In Italy**, the focus was on the attraction of winter and city products in magazine advertisements.
- **Switzerland** is now home to a "Welcome to Canada" visitor centre equipped to handle consumer and trade inquiries about Canada.
- There is an additional focus on **developing markets** such as Austria, Spain, Belgium, the four Nordic countries, and Israel. Activities there are concentrated on working with agents and operators.

challenges

The principal challenge for this group is to raise awareness of Canada. There continues to be low awareness among Europeans about the year-round travel experiences Canada has to offer. This challenge is made that much more difficult by fierce competition from the U.S., Hong Kong, Singapore and Australia.

Europeans tend to visit Canada during the summer months. Successfully positioning Canada as a four-season destination poses the challenge of balancing the investment required to sell Canada's peak season image (when capacity in some areas is limited) against the investment required to develop new markets, products and seasons.



looking ahead

Existing strategies for the marketing of Canada in European markets will be maintained over the next three years, with a more focused effort on returning customers. In France, a first-ever TV infomercial will highlight some of Canada's year-round products, with increased advertising also planned in the U.K. and Germany. Partnerships will continue to evolve, such as those with Adidas, Germany's leading brand of sports clothing; KaDeWe, the prestigious retailer in Berlin; and FNAC, the major entertainment retailer in France, as well as others.

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results

1. Long-term visitors totalled 1.5 million and contributed to receipts of \$1.5 billion.

2. Almost 90,000 trade and consumer show contacts were made and close to 500 media articles generated.

3. Projections for 1996 suggest a 16% increase in receipts and 12% increase in visits.

4. **Trips**

'95 1,401,000 ↑ +26.33 %
'94 1,109,000

Receipts

'95 \$1.5 billion ↑ +36.36 %
'94 \$1.1 billion

5. Total 1995/96 spending of \$14.8 million was shared almost equally between the CTC (\$7.9 million) and partners (\$6.9 million).



CTC



Partners

Asia/Pacific

focus

Canada is an increasingly popular

destination for visitors from the Asia/Pacific

region, with results from this group exceeding

even optimistic forecasts. In Japan, the CTC's

primary market, the focus is on encouraging new

and repeat visitors. Three strong segments — "office

ladies," "fullmoon travellers" and "mature couples" — show particular promise,

opening the door for targeted promotional opportunities. Tapping into rapidly growing

secondary markets, including Taiwan, South Korea, Australia, New

Zealand and Hong Kong, as well as future markets like China, offers

equally exciting potential. The emphasis here is on attracting

affluent, regular travellers. An effectively focused marketing

approach and strong growth in outbound travel are contributing

to Canada's impressive performance.



acific



actions

- **Advertising campaigns** in Japan, Korea, Taiwan, Australia and New Zealand resulted in more than 100,000 consumer requests for a seasonal travel guide.
- **A three-year joint marketing agreement** was reached with JCB International, Japan's largest credit card company, to promote non-peak season travel to their card members.
- **Five multi-year marketing agreements** were negotiated with Japanese tour wholesaler partners targeting customer segments with new tour products.
- **Atlantic Canada** was the focus of a complete market assessment leading to the development of a strategic plan to further attract Japanese tourists.
- **Three travel trade marketplaces** were organized in Japan, Korea and Taiwan for 93 Canadian sellers.

challenges

Canada faces strong competition for a share of Asia/Pacific travel business. Catering to the unique needs of this enormous market is a particular challenge. Research shows that Canada is too big to sell as a single destination in Japan. Increased effort is therefore being put towards marketing regional "clusters" of products. Creating more diversity in the content, destinations and seasonality of travel packages is also required. Competition from Europe requires efforts to maintain a major share of the ski market by promoting Canada as a total winter destination. This involves gaining greater understanding of customer segment needs, habits and expectations.



looking ahead

Strengthening trade and consumer awareness of Canadian destinations in the Asia/Pacific region will continue. To capture the interest of these markets, more diverse packages emphasizing value and price will be developed and promoted. The regional branding strategy is working well and will be further explored to address specific capacity, seasonal and destination challenges. Japan will remain a priority market, and attracting three niche markets — ski, business and student travellers — will continue to be a focus. Expanding partner activities in secondary and emerging markets will also be pursued. A major trade promotion in Southeast Asia is planned and a communications strategy for target markets of the Asia/Pacific region is under consideration.

"Canada is a new gateway for travellers from Japan. The joint marketing agreement between Japan's largest credit card company — JCB International — and the CTC came about as a result of the CTC's cooperation. The agreement will increase the profile of Canada as a destination among JCB's 34 million cardholders around the world, and will help tourism to Canada rapidly grow."

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results

1. More than 300,000 copies of the Canada Vacation Guide were distributed, and awareness levels rose by 17 percentage points to 43%.

2. A database of 75,000 was developed for the mailing of a quarterly newsletter.

3. One of the 1996 targets is to increase leisure travel in Canada by 2.1 million trips and receipts by \$280 million.

4. Outbound leisure travel to the U.S. declined by 313,000 trips in 1995.

5.

Trips

'95 12,403,000
'94 12,716,000 ↓ -2.46%

Receipts

'95 \$5.6 billion
'94 \$5.7 billion ↓ -1.75%

6. Total spending for marketing Canada to Canadians was \$7 million. \$5 million came from the CTC, with partners contributing another \$2 million.



CTC



Partners



CANADA
It's your country.
Rediscover it.

Car

focus The launch in 1995 of the first national tourism marketing program in a decade marked a turning point for the industry — and an opportunity to tap into those Canadians who take an average of 5.4 trips per year. The key, quite



simply, is to make it easier for Canadians to obtain information about their own country as a vacation destination. Most who travel at home currently do so in the same peak seasons as other travellers, and new efforts towards promoting Canada year-round are important in attracting those who choose the U.S. over Canada for holiday travel.



Canada



actions

- The development of the marketing campaign **"Canada: It's your country. Rediscover it."** was an important step towards creating a brand identity which will attract both tourists and corporate partners.
- **National TV ads** were tied to this campaign and promoted city, outdoors and heritage experiences.
- **Two national newspaper campaigns** matched larger partners, such as VIA Rail, Holiday Inn and Canada 3000, with smaller, regional ones like the Hotel Fort Garry, the Ramada Renaissance Dartmouth and Mt. Tremblant Resort Association.
- **The direct marketing newsletter**, "By the way/Entre Nous" continued to build a loyal following of travel customers.
- A **"Rediscover Canada" Vacation Guide** rounded out the campaign.
- **A major study** of what motivates Canadian travellers was launched.

challenges

Research shows that Canadians travel to other countries to buy experiences already available at home, primarily due to lack of awareness of Canadian travel destinations and products. By contrast, the U.S. is viewed as a destination offering accessible information about a wide variety of activities. There is no question that perceptions of Canada require updating, and that existing information is somewhat fragmented and inaccessible.



looking ahead

Efforts will continue to build the "Rediscover Canada" theme as a recognizable brand for future marketing, and to increase the number of industry partners from a current strong base. The attraction of non-industry partners into national television awareness campaigns will remain important, as will initiatives such as travelmercials and direct mail. Overall, activities will revolve around the promotion of leisure travel in Canada in the off-season.

"Many believe that we should invest more in marketing to non-Canadians, who spend more than Canadians do when they travel in Canada. That viewpoint is perfectly valid; on the other hand, as someone recently said to me, 'If we can't convince Canadians to stay in Canada, how can we convince others?'"

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results



U.S. Bu

1. In 1995, \$193 million worth of meetings business was influenced by the CTC's Business Travel Program

2. Targets for 1996-97 are \$1.2 billion in receipts and 2 million trips

3. **Trips**

'95 1,926,000
'96 1,793,000 ↑ +7.42%

Receipts

'95 \$1.1 billion
'96 \$1.0 billion ↑ +10.00%

4. Total spending by the U.S. Business marketing committee in 1995/96 was \$8.6 million: \$4.4 million coming from the CTC and \$4.2 million from partners



CTC



Partners

focus To "brand" Canada as a top choice in the minds of the entire U.S. meetings market is no simple task.

Using partnerships as the cornerstone, efforts

towards this goal revolve around creating a

single, focused "Canada campaign" to achieve a

dominant presence in the marketplace, raising Canada to the top

of the list of preferred meeting destinations.



Business Travel



actions

- **The largest ad campaign** ever was launched in this area, with major dollars spent on trade publications for the business market.
- **New direct mail** and follow-up materials were created for the market.
- **The Showcase Canada** program brought together U.S. buyers with Canadian sellers in 13 marketplaces across the U.S.
- **The "Visit Canada"** program successfully brought 435 U.S. buyers to Canada to experience destinations, facilities and services first-hand.

challenges

Although many in the business travel industry express a high level of satisfaction with the CTC and its programs, challenges in this market remain centred around positioning Canada as an attractive meetings destination. Long-term investment is the key here, since the cycle of "buying" can occur anywhere from one to ten years. There is heavy competition from many U.S. destinations for business and incentive travel, but Canada has the competitive advantage of being perceived as "just like home" but cleaner and safer.



looking ahead

A major branding effort will launch with the "Great Canadian Adventure" as a key product for the incentive travel industry. In addition, a relationship marketing database will be initiated to expand the customer base and allow more direct-marketing and retail opportunities. The group will also continue with an aggressive ad campaign in harmony with the U.S. Leisure Travel campaign. At the same time, opportunities to market Canada from November to April will be designed to address seasonality challenges.

"The CTC's vision is long-term, and I'm impressed by the quality and experience of the people who have come together with a commitment to this shared direction. I know that our marketing efforts at the Winnipeg Convention Centre will be complemented by those of the CTC, and we'll all benefit."

Klaus Lahr
General Manager, Winnipeg Convention Centre,
Winnipeg, Manitoba

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Québec, Québec

Bruce MacMillan
Vice President
Sales & Market Development
Greater Vancouver Convention
and Visitors Bureau
Vancouver, British Columbia

results

1. Advertising generated 2,750 inquiries which exceeded targets.

2. Total spending by the Aboriginal marketing group was \$1.2 million in 1995, with \$950,000 coming from the CTC and \$300,000 from partners. The amount from partners was slightly lower than anticipated in 1995/96, although the number of partners was higher than hoped, resulting in profile among a greater number of individuals.



CTC



Partners

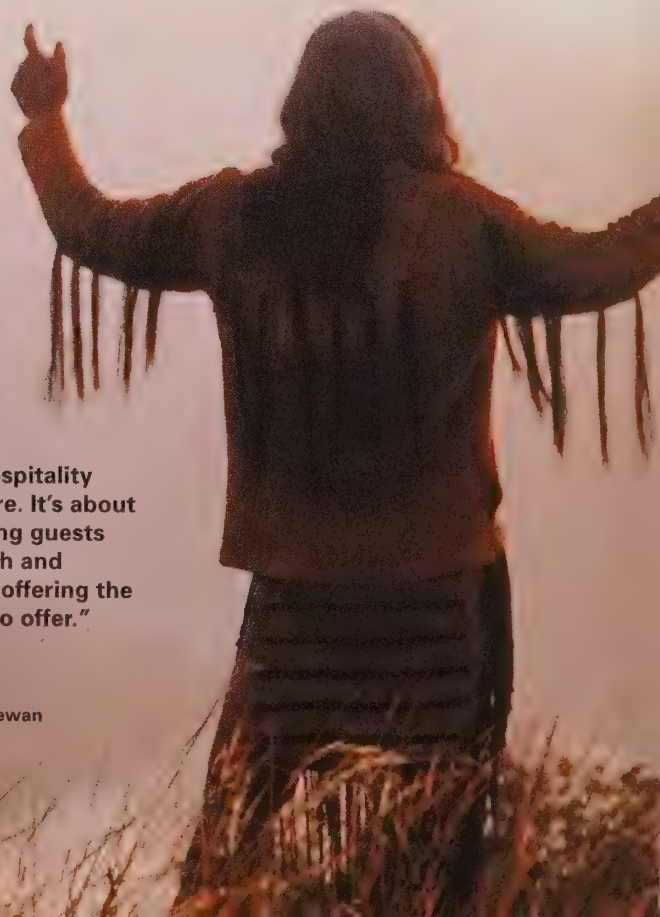
LIVE LEGACY

Aboriginal

focus The concept of Aboriginal tourism as a "product" is relatively new, so the assessment and identification of suppliers with export-ready products has been a focus in this area. This has been done by measuring the level of interest in Aboriginal culture and heritage through limited promotional activities.



Research in this area indicates a high level of interest among travellers both at home and abroad, specifically from Germany, Italy and France. All are interested in Aboriginal people who are being viewed as a global society embracing a traditional knowledge base, spiritual harmony and exotic regions.



"There is an instinctive hospitality rooted in Aboriginal culture. It's about welcoming and entertaining guests and strangers with warmth and generosity. It's also about offering the best of what Canada has to offer."

Ken Thomas
CEO, SIAP Inc.
Saskatoon, Saskatchewan

ginal Tourism

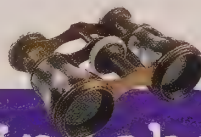


actions

- **A magazine advertising supplement** titled "Live the Legacy" was launched in *German Vogue* (1.3 million readers) and Canada's *Saturday Night Magazine* (1 million readers).
- **Five promotional celebrations** of Aboriginal culture occurred in Frankfurt, Stuttgart, Berlin, Leipzig and Dusseldorf in conjunction with the Vogue insert (partners included Inter-Continental Hotels and Air Canada), and targeted 1,300 travel and media representatives.
- **A popular German TV program** — "The Globetrotter" — hosted by German celebrity Hardy Kruger featured two Canadian Aboriginal Actors, Tom Jackson and Gordon Tootosis and reached an audience of about 22 million.
- A pilot site on the **World Wide Web** was developed to help in the dissemination of market information and development of partnerships. This network includes twelve operators active on the Aboriginal Information Network and is of key importance in providing a marketable tourism product in this area.

challenges

Many areas of Aboriginal tourism remain undeveloped due to a variety of geographic and industry challenges. Many operators, wholesalers and suppliers work in isolation, unaware of others' activities. To aid in communication, the Aboriginal Tourism Information Network has piloted a site on the Internet, and a direct mail campaign was targeted at more than 3,000 tourism advisors. A lack of market research on the demand for Aboriginal tourism was previously an obstacle, although research conducted by Dr. Peter Williams of Simon Fraser University confirmed a high level of interest in Aboriginal culture in specific areas of Europe.



looking ahead

Building on the "Live the Legacy" theme for this market, efforts will expand beyond the test market to trade development in several major areas. These include the introduction of Aboriginal suppliers to trade opportunities in Germany, the incorporation of Aboriginal products into existing and new travel packages, and the production of a comprehensive Aboriginal Travel Guide to be used by the travel trade and consumers. Partnership training and development for Aboriginal tourism entrepreneurs will also be pursued. A comprehensive review of the program will also be completed, with the goal of integrating it into the other core marketing programs, specifically Europe and Canada. Another planned highlight will come from Dr. George Kanahela, a renowned pioneer in native tourism in Hawaii, who will offer training on guest/host relationships to Aboriginal businesspeople from Western Canada.

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President,
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Resorts Ltd.
Vernon,
British Columbia

*Resigned prior
to March 31, 1996*



Industry Enhancement

focus

The Industry Enhancement group helps the industry develop products that meet global market demand. They create and deliver information programs that meet industry needs and assist in decision making, while identifying issues that are critical to the industry's competitiveness.

actions

- **A new concept of "Product Clubs"** was developed to provide a way for smaller industry participants to come together to develop innovative approaches to product and market challenges and ultimately to jointly increase the diversity, accessibility and use of the Canadian tourism product.
- **Industry consultations** were held in cooperation with the Tourism Industry Association of Canada to identify factors that are critical to the success of the tourism industry.
- **An Internet web site** was developed providing basic CTC information and links to other Canadian tourism sites.
- **On-line marketing seminars** in eight Canadian cities were conducted in cooperation with the Canadian Tourism Research Institute.
- **An annual survey** on the accommodation sector was completed with the Research team.

challenges

No comprehensive analysis of Canada's tourism products has been done to date. This makes it difficult to determine whether current capacity and product offerings will meet future demands. An additional challenge is to ensure small- and medium-sized businesses have access to relevant information to support their decisions. Future attention will be given to increasing the diversity, accessibility and use of the Canadian tourism product.

looking ahead

While the Industry Enhancement group will continue to deliver relevant product information, they will also work towards addressing the question of how the industry will meet the challenge of increased consumer demand. The industry-developed marketing plan calls for some 5.8 million more overnight person-visits from the U.S. and overseas market in 1998 than in 1994, and targets keeping 600,000 Canadians from taking an overnight trip to the U.S. Analysis and assessment will concentrate on four key factors: financing, packaging, access (including transportation and customs), and seasonality. The development of Product Clubs will continue to be a key initiative for 1996/97.

results

Total spending in this area for 1995/96 was \$1.6 million, with almost \$1 million provided by the CTC and the remaining \$625,000 coming from industry partners



CTC



Partners

"Much of Canada's attraction is that it is so varied and diverse. This advantage is also a unique challenge in that our 'product' is more geographically dispersed than most of our competitors. The need for partnerships to achieve a unified success is never more compelling — and the opportunity to create them is probably never greater than now under the CTC."

Roger Wheelock,
General Manager, The Butchart Gardens, Victoria, British Columbia

Industry Competitiveness

Research

focus

The research group is a cornerstone of the CTC — a foundation of information upon which the marketing committees can build their actions. The group looks at both the demand and supply side of the equation, helping industry make informed decisions. The examination of local and international surveys provides critical understanding of international markets and the travel patterns of visitors. Another important function of this group happens through the Tourism Satellite Account — a database which processes information from supply and demand surveys to provide a credible, composite view of the tourism industry in Canada.

actions

- **Statistics Canada's domestic Canadian Travel Survey** was improved to assist the provinces and regions in obtaining reliable expenditure data at specific locations; e.g. cities and towns.
- **More than 100 National Tourism Indicators** were developed, permitting the timely tracking of tourism — including a quarterly and annual watch on supply, demand and employment.
- Work continued on revision of the **Canadian Standard Industrial Classification** of tourism-related industries as part of the development of the new North American Industry Classification System.
- **Key research partnerships** included the provinces, Statistics Canada, the Department of Heritage, and the governments of the United States and Mexico as well as the World Tourism Organization and the Organization for Economic Cooperation and Development (OECD).

challenges

Private-sector support of the CTC's research activities has been slow in forming, and actions over the next year will seek to develop this important area to ensure ongoing partner funding for research. In addition, the challenge of disseminating and communicating the data collected by this group will be met head-on.

looking ahead

New efforts will be focused on getting research data out through the media. Development will continue on the Tourism Satellite Account, a new Tourism Economic Impact Model and estimates of government revenues attributed to tourism as well as strategic trade studies of South Korea, Brazil and Spain.

"The information the CTC is now processing and providing to everyone from marketing groups and international researchers to the media is — quite simply — the most accurate, timely, and detailed in the world."

Dr. Stephen Smith,
Professor, Recreation & Leisure Studies,
University of Waterloo, Ontario

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Canadian Travel Survey Working Group

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Calgary, Alberta

Elena Fanucchi (Co-Chair)
Manager, Marketing Research
Air Canada, St. Laurent, Québec

results

Total spending in this area for 1995/96 was \$3.1 million, with \$2 million coming from partners and the balance of \$1.1 million provided by the CTC. The target for 1996/97 is \$3.4 million in partner contributions.



CTC



Partners

financial summary

Notes to financial summary

(For the period April 1, 1995 to March 31, 1996)

The federal government has committed \$50 million per year for the CTC programs and has requested that industry match the funding in three years. In the first year, CTC partners have contributed \$40.9 million, cash and in-kind support, to the CTC programs. In total, \$90.9 million was spent on program activities during the 1995/96 fiscal year. The CTC expects to exceed its three-year target of \$100 million during its second year.

1995/1996 Total financial summary

Operations	CTC core expenditures	Partners expenditures	Total expenditures
U.S. Leisure	\$18,987	\$9,670	\$28,657
U.S. Business Travel	4,475	4,165	8,640
Europe	8,975	15,045	24,020
Asia/Pacific	7,950	6,873	14,823
Canada	5,000	2,025	7,025
Special Initiatives	0,124	0,000	0,124
Aboriginal	0,950	0,300	1,250
Industry Enhancement	0,947	0,625	1,572
TourTek*	0,150	0,150	0,300
Research	1,068	2,051	3,119
Corporate Services	1,127	0,000	1,127
President's Office	0,252	0,000	0,252
Total Operating	\$50,005	\$40,904	\$90,909
Salaries	\$3,897		

(Figures provided in millions of dollars)

The federal government provided the CTC an additional \$13.637 million at the end of the 1995/96 fiscal year. This bonus was in response to the industry's strong performance in 1995 - an increase of \$2.8 billion in tourism revenues — and was applied against approved programs for 1996/97.

*TourTek: an electronic information program being developed in partnership with industry to link with other product resource sites.

performance highlights

Tourism in Canada performed very strongly in 1995 as the following performance figures illustrate. The year also saw changes to the methods we use to measure tourism's economic impact.



Revised international travel account

Years	Total receipts	Total payments	Deficit
1991	\$7,691	\$13,752	-6,061
1992	\$7,897	\$14,254	-6,357
1993	\$8,610	\$14,359	-5,749
1994	\$9,730	\$13,698	-3,968
1995	\$10,997	\$14,028	-3,031

(Millions of dollars)

The travel account deficit improved to \$3.03 billion in 1995 from \$3.97 billion in 1994, representing a deficit reduction of

23.6%



In 1995 tourism spending in Canada amounted to \$41.8 billion, up from \$39 billion in 1994 — a \$2.8 billion or 7.1% increase in 1995 over 1994.

Between 1994 and 1995 domestic tourism receipts increased 4.6% to \$30.8 billion, while tourism spending by foreigners in Canada rose 14.7% reaching \$11 billion in 1995.

Major overseas markets

Country of origin	Change from 1994	
• United Kingdom	641,000	up 11.1%
• Japan	589,000	up 22.4%
• France	430,000	up 4.9%
• Germany	421,000	up 14.7%
Total Europe	2,119,000	up 9.4%
Total Asia	1,288,000	up 27.0%
Total Overseas	3,927,000	up 14.5%

1995 tourism employed 488,500 persons directly, over 8,000 more than in 1994 (480,400 persons). This represented a 2% increase in tourism employment in 1995 over 1994, as compared with no growth in the overall business sector of the Canadian economy for this same period.

1995 International tourists to Canada

	Change from 1994	
Tourists from the U.S.	13,005,000	up 3.7%
Tourists from overseas	3,927,000	up 14.5%
Total	16,932,000	up 6.0%

In 1995 foreigners made nearly 17 million person-trips to Canada, representing a 6% increase over the preceding year. The importance of overseas tourists continues to increase and now represents close to one quarter of all international trips.

1995 Top world tourism destinations

Rank	Country	International tourist arrivals (000's)	% Change from 1994
1	France	60,584	-1.2
2	Spain	45,125	+4.4
3	U.S.	44,730	-1.7
4	Italy	29,184	+6.2
5	China	23,368	+10.9
6	United Kingdom	22,700	+7.9
7	Hungary	22,087	+3.1
8	Mexico	19,870	+16.1
9	Poland	19,225	+2.2
10	Austria	17,750	-0.8
11	Canada	16,932	+6.0%



Sources for the above data: Tourism Satellite Account; National Tourism Indicators; International Travel Survey; The International Balance of Payments; World Tourism Organization.

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(as of March 31, 1996)

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Canadian Native Arts Foundation
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Saskatchewan Opportunities Corporation
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Ministry of Small Business, Tourism and Culture
Government of British Columbia
- + Rick Antonson
President & CEO
Greater Vancouver Convention and Visitors Bureau

Federal Government

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Deputy Minister, Industry Canada
- Harry Swain
(served January 31, 1995-October 25, 1995)
Deputy Minister, Industry Canada

- * **Member of the Executive Committee** • Carries out the business of the Commission between meetings of the full Board.
- + **Member of the Performance Measurement Committee** • Oversees the CTC's finances and establishes performance measures for programs and expenditures.

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Manager, Research

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